





Assess Your Relationship with Money

Answer each question on this worksheet to help you realistically assess your relationship with your personal finances.

Rate the health of your relationship with finances.

 1 2 3 4 5 6 7 8 9 10  **Unhealthy** **Healthy**

Why do you feel that way?

If you ranked yourself less than a 10, what area of your finances do you avoid?





Yes

No

Do you avoid looking at your bank statements because of what numbers might be there?

Do you feel anxious every time you log in to your credit card account?

Do you leave mail unopened because you don't want to deal with the bills?

Do you see the material things that other people have and feel unworthy?

Do you get embarrassed when you don't understand financial terminology, but feel afraid to ask for clarity?

Do you avoid conversations about money with your partner, family, or friends?



Your Money Mindset

Check any of these statements that you believe about money:

Money makes me a better person.

Money brings happiness.

Money makes me more worthy.

Money is a finite resource.

Money is hard to come by.

Money causes problems.

Money is evil.

Money decides my fate.





Engage in a Conversation about Money to Take Your Power Back

I want you to have a money conversation with a loved one, friend, or family member today. Whether you're experiencing financial stress, or simply wanting to improve where you're at, this conversation is the best way to lift each other up and bring your dreams—and your loved one's dreams—into reality.

Here are two scripts you can use—one if you're in a tough spot and one if you're in a place of positive dreaming—to engage in a conversation about money that helps you take your power back.

MONEY CONVO SCRIPT 1: IF YOU'RE IN A TOUGH SPOT . . .

Ask an open-ended question to someone in your support system:

What's the roughest financial patch you've ever been through?

How did you get through it and who did you confide in?



What types of feelings do you remember experiencing at the time?

Once they've answered or shared stories about their experience, then ask:

Would you be open to giving me advice on something that I'm currently experiencing?

Respond by saying what you've been going through. Feel free to stay high-level until you feel comfortable. Once you share, follow up with:

I admire you and how you live your life.

Would you be open to sitting down with me to help me solve some of the specifics of my financial challenges right now?

- Then commit to a date where you bring everything written down that you're worried about and see what advice they might have. While they're not expected to be a financial expert, having someone with whom you can process your problems out loud is an important first step in deciding to take your power back.





MONEY CONVO SCRIPT 2: WHEN YOU’RE TRYING TO LEARN INTO YOUR FINANCIAL POSSIBILITIES . . .

Ask an open-ended question to someone who has a financial reality that you admire:

How do you define being wealthy? Is it a number, an achievement, or a feeling?

What has helped you believe that you could get to where you are today?

Is there anything that you've done, specifically, that you'd recommend I do to follow in your footsteps? Once they've answered or shared some stories about their experience, then ask:

Would you be open to giving me specific advice on how I get from where I am to where I want to be?





Then share with them where you desire to be. Once that happens, follow up with:

I admire you and what you've created for your life. Would you be open to sitting down with me to help me to dream up what might be possible for my financial future?

Then commit to a date for this follow-up conversation.

While this person should not be expected to be a financial expert, having someone to process your dreams out loud is an important first step in deciding to claim power over your financial future.

